



USAID
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KOSOVO

CLUSTER AND BUSINESS SUPPORT PROJECT

Association Development

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Submitted to:
USAID/Kosovo
Cognizant Technical Officer: Timothy Hammann

Submitted by:
Chemonics International Inc.

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This publication was produced for review by the United States Agency for International Development. It was prepared by the KCBS team of Chemonics International Inc. based on a Final Report prepared by Short Term Technical Advisor, Mr. Bruce Butterfield.

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The authors' views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

PURPOSE OF ASSIGNMENT

The Association Development/Strategic Management Specialist will assist fledging associations and other business related nonprofit organizations (NPOs) to achieve self-sustainability by educating board members to tie strategic plans to specific action plans that serve the organizations' mission, assign and manage limited resources, and introduce SMART goal setting practices. He will also serve as a mentor to KCBS cluster team leaders, functioning as association executive directors on best practices in transparent association management, board relations, and advocacy. This will be accomplished through meetings with staff and volunteer leaders of specific associations, training workshops for associations and business services providers, and one-on-one counseling of association staff selected by KCBS.

BACKGROUND

With a long tradition of government subsidies under communist rule and years of donor assistance since the war, there is little understanding in Kosovo that associations must function like any other business by assessing goals and objectives against resource limitations. This is aggravated by and, in a circular fashion, helps to perpetuate their near total dependence on volunteer labor. Consequently, associations do not know how to price products and services and therefore do not charge properly if they charge at all. Nor is there an understanding of the proper relationships between board members, general members, staff, and non-member clients.

As a result, associations remain addicted to donor support, which accounts for 80 percent of total revenue for even the largest and most influential associations. As international and local government agencies provide the bulk of association revenue, the advocacy relationship between associations and government has been essentially turned on its head in Kosovo as government agencies often use associations to do their bidding. In fact, most of the pre-existing associations in Kosovo were created by donor agencies to deliver the services associated with specific programs or projects. As a consequence, neither association leaders nor government officials have an understanding of or experience managing the inherent conflicts of interests in transparent advocacy relationships. In order to become effective, credible, and transparent advocacy organizations, associations must first achieve financial independence from the organizations they are lobbying.

To accomplish this, Kosovar associations must:

- Adopt transparent budgeting practices;
- Develop revenue generating fee-for-service activities;
- Hire staff to organize and manage association activities; and
- Create long-term (multi-year) strategic and project planning

EXECUTIVE SUMMARY

Prior to the start of the assignment, the KCBS team decided that for the associations to develop and successfully implement their strategic plans, they should retain business service providers to carry out scopes of work tied to these plans. KCBS prepared on behalf of the associations, requests for proposals to implement the plans, and followed through with pre-bid meetings, clarifications of the request documents, and specifically worked with association boards to evaluate proposals. KCBS assisted the associations in negotiations of final contracts and ensured a transparent award process was followed.

In the course of the assignment, some elements were modified due to the additional needs for strategic planning and request-for-proposal development and counseling. Delays in the proposal evaluation process resulted from the lengthening of deadlines in order to allow evaluators sufficient time to understand their roles and conduct reviews.

FIELD ACTIVITIES TO ACHIEVE PURPOSE

During the course of the assignment, the following activities were carried out:

- Presenting at the second bidders' conference on how to create partnerships and networks to strengthen firms' capabilities.
- Designing and delivering a one-hour seminar on proposal writing at the KCBS offices. More than 25 business service providers and five associations participated. Associations were invited in order to learn what to look for during proposal evaluation. Handouts included copies of the Power Point presentation and an example of a Forbes Group proposal, both included as Annexes 1 & 2 to this report. Several participants asked for electronic versions, which were made available in English and Albanian.
- Counseling Arieta Vula, executive director of the Association of Wood Processors [AWPK], and Burim Meqa, KCBS contact, on how to revise and streamline the association's strategic plan and scope of work in its requests for proposal to make them more realistic.
- Designing suggested guidelines and a score sheet for proposal evaluators to use when reviewing submissions – see Annex 3 & 4. Copies were provided in English and Albanian to KAMP, SHPUK and AKA during discussions of proposals with each association.
- Counseling evaluation teams from KAMP, SHPUK and AKA on expectations and proposal review skills.
- Working with Rick O'Sullivan on revision of the Anadrini strategic plan.
- General counseling of KCBS staff on the proposal review process.

TASK FINDINGS AND RECOMMENDATIONS

In the course of this assignment, we identified a number of issues that needed to be addressed.

Association of Wood Processors [AWPK]

- In working with AWPk, it became evident that Ms. Vula, the executive director, often deferred to Mr. Meqa of KCBS, and it was decided that the KCBS advisor's role should be consultative not directive.
- AWPk's strategic plan has been created with no input from its board of directors, and Ms. Vula sees the plan as something that the board simply will adopt as written.

Association Strategic Plans and Scopes of Work

- Many of the associations' strategic plans are overly ambitious, which leads to overly ambitious scopes of work for business services providers to bid on. As the bidding process progresses, funding and respondents' capacity to perform proposed work will require lowering of expectations. For example, the RCAF strategic plan's first priority is establishment of a testing laboratory whose estimated cost is more than 250,000 Euros, mostly for purchase of equipment. RCAF still labors under the belief that the lion's share of funding for that priority will come from KCBS or other donors.
- The viability of SHPUK seems doubtful. In a meeting on Tuesday, July 19, the three board members in attendance complained that the association is inactive, has no money and cannot attract members to attend training sessions or seminars, whether for fee or free. They complained that they were unfamiliar with the scope of work even though they approved both. They were skeptical of any business service provider's ability to create program content about the poultry business. They were not interested in the proposal selection process and seemed to want to abdicate their board responsibilities and let KCBS staff choose a business service provider. KCBS must determine how much more they wish to invest in an association that appears to have little chance for survival, let alone sustainability.

Proposal Selection

- Right now, the proposal selection process is not working well for KAMP and SHPUK. It does seem to be all right for AKA. Both KAMP's and SHPUK's board members felt unprepared to deal with the proposals, let alone make judgments about them, because they were not in Albanian and there was insufficient time for understanding the review process. In KAMP's case, the sole board member to meet with KCBS staff on July 18 was uncomfortable with making a decision on proposals even though he had been designated by the board as their official representative. Another meeting is scheduled for

July 20 after I have left Kosovo, and Safo Musta believes that it will go better than the first session.

CONCLUSIONS AND RECOMMENDATIONS FOR FUTURE ACTIVITY

The following recommendations are made for future work in developing association strategic plans and where business service providers are being contracted to provide services to the associations in implementing these plans:

- Strategic plan development always should involve the associations' boards. This seems to have been spotty.
- Association boards should formally vote to adopt the plans and approve scopes of work based on them. Some board members seemed unclear about what bidders were being asked to do and why.
- Association leaders need to clearly understand the bidding process and their roles and responsibilities in it. This should be accomplished in meetings with the individual associations' board members, especially those who will be on proposal evaluation teams.
- Provide more information up front to associations and bidders about expectations and resources. There still seems to be the expectation that KCBS will pick up the tab for most activities. KCBS should be specific about the size and scope of grant limitations in calls for bids.
- Scopes of work should be done on time. Because many deadlines slipped, there was insufficient time to prepare and send SOWs to the potential bidders. Bidding seminars should not be scheduled until scopes of work are complete, and SOWs should be sent to potential bidders at least a week before the bidders' conferences.
- Association strategic plans and scopes of work should be realistic in terms of projects, timelines and resources. In one case, a potential bidder refused to bid because they believed that the scope of work was too ambitious to be accomplished in a year.
- Bidders should submit proposals in both English and Albanian. Many association board members simply are not fluent enough in English to be effective evaluators of English-only submissions. There should be an original and at least two copies in each language.
- Bidders should be strongly encouraged to be more brief in their responses. The proposal writing seminar which was held may help with this.
- The deadline for proposals should be three weeks from the date of the bidders' conference to allow adequate time for thoughtful responses. Some bidders simply regurgitated the scope-of-work elements and stuck a timeline and price on them rather than explaining how they would approach the deliverables.

- Evaluators should have a one-hour training course on their roles and responsibilities, on suggested guidelines for evaluating proposals and on the use of suggested scoring sheets.
- Evaluators should have two weeks to read proposals, meet and make a decision. Proposals should be available in English and Albanian to the evaluation teams.
- Evaluation teams should be composed of a minimum of two association board members, the executive director, if there is one, and the KCBS project manager as an advisor.
- Decisions on contract awards should be made by consensus and discussions and proposals should be kept confidential within the evaluation team.

KOSOVO

CLUSTER AND BUSINESS SUPPORT PROJECT

Association Development

Annexes

Annex 1 – Elements of Good Proposal Writing

Annex 2 – Sample Forbes Group Proposal

Annex 2 – Technical Evaluation Guidelines

Annex 4 – Technical Evaluation Checklist



ELEMENTS OF GOOD PROPOSAL WRITING FOR KCBS

By Bruce Butterfield, CAE, APR
President, The Forbes Group
Fairfax, VA USA



PURPOSE OF A PROPOSAL

- Demonstrate your knowledge of the project
- Explain why your firm is qualified to do the project
- Show how your firm will meet project requirements
- Identify resources and timelines needed to complete the project
- Offer an initial agreement or MOU



PROPOSAL COMPONENTS

- Title page
- Table of contents (optional)
- Background
 - Understanding of project
 - Research into project requirements
 - Statement of interest and qualifications
- Situation analysis (optional)



PROPOSAL COMPONENTS

- History and capabilities (brief)
- Team (brief biographical sketches of senior-level people on the project)
- Scope of work
 - Modular
 - Specific
 - Individually priced deliverables
 - Timelines for each deliverable
 - Include start date (with milestone dates) and end date tied to start date not calendar



PROPOSAL COMPONENTS

- Project timeline (avoid calendar dates)
- Initial approval or MOU
 - May depend on client requirements
- References
 - Choose clients in sectors similar to the project client
- Appendix (not all items will be needed in all proposals)
 - Detailed team biographies
 - Client list
 - Detailed capabilities list
 - Articles or white papers you have written that support your ability to handle the project



REMEMBER...

DON'T SUBMIT ANYTHING **NOT**
SPECIFICALLY REQUESTED IN
THE RFP



PROPOSAL ESSENTIALS

- Use clear, concise language.
 - Check spelling and usage (find native-speaker to review)
- Be brief. Clients have short attention spans.
- Don't try to cover up weaknesses in your capabilities or team. Find partners who can do what you can't.
- Check your scope of work against the client's RFP to make sure it is relevant.



PROPOSAL ESSENTIALS

- Cost your proposal realistically based on client resources
- Use fixed-cost pricing for professional fees and pass-through pricing for individual incidental expenses.
 - Task pricing should change only if the scope of work changes and you and the client agree on the modifications in writing.

**PROPOSAL TO PROVIDE
STRATEGIC MANAGEMENT SERVICES
FOR AMERICA'S CHARITIES**



January 21, 2003

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PROPOSAL TO PROVIDE STRATEGIC MANAGEMENT SERVICES FOR AMERICA'S CHARITIES

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BACKGROUND

America's Charities is a non-profit federation of charities providing national and local charitable workplace-giving services. Founded over 20 years ago, America's Charities – as part of its mission – provides employers and employees with workplace charitable giving campaigns that strive to offer a broad range of choices to employees and employers. In addition, America's Charities provides its more than 100 charitable organization members with the resources necessary to meet human service needs.

America's Charities recognizes that the environment of workplace giving is changing dramatically, both with regards to the structure and administration of workplace-giving campaigns as well as employer and employee practices and preferences regarding workplace giving. These changes include the loss of the monopoly the United Way once had as the exclusive charity in corporate campaigns. They also reflect the increasing role technology is playing as the means through which campaigns are administered.

Given the changing environment, America's Charities has decided to re-visit its vision, mission goals, policies and practices to consider how to best position the organization for continued growth and to evaluate other opportunities. As part of this process, America's Charities sent out a Request for Proposals to selected consultants. The Forbes Group, Inc., was among the firms approached to provide services. We see many association and nonprofit organization RFPs and compliment America's Charities on one of the best to cross our desk in a long time. It is clear, concise and contains informative enclosures. This proposal is our response to the America's Charities RFP.

THE FORBES GROUP

The Forbes Group is a 21-year-old research and management counseling firm that helps organizations develop their preferred future by thinking, planning and acting strategically. Most of our work is with trade associations, professional societies and other nonprofit organizations. Our focus is comprehensive and future-oriented.

Using various analytical tools — including environmental scanning, bench marking, economic analysis and alternative future scenarios — we help our clients identify economic, political, legal, social, demographic, technological and environmental trends and their potential impact. Using this information, we then work with volunteer leaders and staff to develop a strategic direction to take advantage of emerging opportunities and lead to a preferred future. This often means transformational change such as the creation of new professions and industries, new organizations and new product lines. As examples, recently we have created a new profession and organization in information management, a new medical profession, and refocused a national association's foundering state lobbying efforts to achieve professional recognition that now has been successful in more than half of the states.

Over the past four years, The Forbes Group, Inc. has helped the Ronald McDonald House of Los Angeles with their strategic planning process and capital campaign. We are currently working with Ronald McDonald House Charities of Southern California on board training and strategic planning.

Complete information about The Forbes Group, Inc., including scores of articles, book chapters and research we have prepared on association and organizational management, is available on our website at www.forbesgroup.com.

ANALYSIS

It is no news that the world of nonprofits and their members is on the cusp of fundamental change. The unanswered question is what to do about it. This change is being driven on a macro level by globalization; the creation of modular relationships that supersede industry, professional and geographic boundaries; the technology of connection that permits wide and instantaneous sharing of information and knowledge; and the entrance of the Millennial generation, the most collaborative generation in human history, into the workforce.

On a more micro scale, America's Charities is seeing shifts in the charitable giving environment,

some of which were identified in the RFP. Clearly, technology and personal preferences – including trust by individuals of large charitable organizations – are affecting the world in which America’s Charities and its members operate. In addition, America’s Charities faces competition from other nonprofit groups, for-profit vendors and federal, state and local campaigns. America’s Charities is interested in considering their strengths and weaknesses, opportunities and threats by examining their current position and focus; evaluating their tactics and capabilities and asking whether they are on track to achieve elements of a new vision, mission and goals.

The Forbes Group’s Methodology

The Forbes Group’s planning methodology focuses on developing a preferred future for the organization along with a clear and concise mission, achievable goals and outcomes-based plan.

Preferred Future

One outcome of future-focused planning is the creation of a preferred future for America’s Charities. Unlike meaningless “vision statements,” a preferred future describes the organization at a defined future point and works back to the present with identified milestones of accomplishment. Its mission and plan grow from that. We noted that there was no specific “vision” or preferred future identified in the materials we received. There were, however, 13 examples of “vision statements/concepts” provided in the RFP.

Mission

According to Peter Drucker, a mission describes what an organization does – its outcomes. America’s Charities current mission was included in the RFP:

America’s Charities mission is to provide employers and employees with efficient, effective, low-cost workplace charitable giving campaigns; to offer a broad range of choices that reflect the diversity of the American people; and to provide member charities with the resources required to meet human service needs.

Dissecting this mission, America's Charities principal businesses are offering workplace charitable giving campaigns to employers and employees; offering a range of choices in charitable giving options, and providing resources for America's Charities members to meet their and human service needs.

It is unclear by this mission statement how America's Charities goes about fulfilling the three main areas of business. Without clarity, it may be difficult to determine what work would fulfill these mission elements.

Because a mission acts as a first filter for the many ideas that bubble up from staff, leaders and members, it should be exclusive not inclusive. For example:

The mission of the Vision Council of America is to inform targeted consumer audiences about the value of eyecare and eye wear; improve the marketing skills of eye wear providers and provide forums for the exchange of industry information.

This association's businesses are consumer information programs, skills improvement programs for industry marketers and facilitation the exchange of information. Each of these three businesses is a goal of the association's plan and specific objectives and strategies are arrayed under them.

We recommend that America's Charities strategic plan elements be based on the businesses identified in the mission, which should be a topic of this planning endeavor. Also, we recommend that priorities be set for each of the mission elements and that the objectives and strategies that support them be prioritized as well. This enables easier allocation of human and financial resources and allows for quick decisions to be made about program support should circumstances change. We believe that all objectives and supporting strategies need completion dates, measurability and assignment of responsibility to ensure that they are accomplished.

In our planning methodology, we separate the program and management sides of the plan. In this way, you decide first what you do (program) then how you do it (management). This is especially useful in identifying management areas that may need additional attention, such as the board/staff relationship and board/staff roles and responsibilities. This also eases priority setting because it is difficult to rank the comparative value of program and management goals and objectives.

THE FORBES TEAM

The team that will work with America's Charities consists of the principals of the firm. Complete bios on both Bruce Butterfield and Amy Brown appear in the appendix.

Bruce Butterfield, CAE, APR, president. Butterfield has more than 30 years of experience as an association and public relations executive and has worked with dozens of trade, professional and other nonprofit groups. He is a leading association futurist and strategic thinker who has written and spoken extensively about association and organizational management issues and the future of "associating." Butterfield is a Certified Association Executive and has held leadership positions in the American Society of Association Executives (ASAE) and the Greater Washington Society of Association Executives. He is an ASAE fellow and accredited member and fellow of the Public Relations Society of America and has won national awards for his work in the public affairs arena.

Amy L. Brown, chief executive officer. Ms. Brown handles all aspects of client management including designing preferred future and strategic planning retreats, conducting and analyzing research, and developing future scenarios. She has completed master's coursework in futures studies at the University of Houston-Clear Lake, Texas, one of two such programs in the nation. She has published articles about futures analysis methods and systems thinking and has served on various committees for both the American Society of Association Executives and the Greater Washington Society of Association Executives. She is an active member of the World Future Society and has been involved in the creation of a new professional organization – the Association of Professional Futurists.

We propose the following specific tasks for America's Charities strategic work. As with all proposals, these tasks are our best assessment of an approach based on current information. However, they are subject to refinement following detailed discussions with America's Charities and development of an agreed-upon scope of work. All steps are modular and separately priced to enable America's Charities and The Forbes Group, Inc. to arrange a scope of work that best suits time and budget requirements.

SCOPE OF WORK

Step 1: Preparatory Analysis

Thoroughly review, analyze and assess all relevant documentation including bylaws, planning documents, publications, minutes of relevant meetings, research, etc. to achieve the necessary base-line understanding of America's Charities.

Step 1 Professional Fee: \$0000 (Elapsed time: 1 week)

Step 2: Staff and Leadership Interviews

These interviews will address the critical issues confronting America's Charities and will entail questions pertaining to strengths, weaknesses, opportunities and threats. We will seek to determine significant changes in America's Charities environment given the issues addressed in the RFP. The Forbes Group will provide a block of time for scheduling interviews. Personal interviews are essential for us to get a grasp of the personalities and cultural nuances of the association that are not readily discernible by other methodologies.

- a. Interview the six members of the senior staff either in person or by telephone.
- b. Interview the nine members of the strategic planning task force by telephone.

Step 2 Professional Fee: \$0000* (Elapsed time: 4 weeks)

*Additional interviews are \$000 each.

Step 3: External Constituency Interviews (Optional but recommended)

Interview representatives of up to ten of America's Charities important external constituencies who could provide helpful insights. These might include leaders of other nonprofit organizations, corporations, government and media representatives. The Forbes Group will provide a block of time for scheduling telephone interviews.

Step 3 Professional Fee: \$0000* (Elapsed time: 4 weeks)

*Additional interviews are \$000 each.

Step 4: Report on staff, leader and external constituency interviews

Compare and contrast the results from the staff, leader and external constituency interviews. Prepare a report for distribution to senior staff and strategic planning task force members.

Step 4 Professional Fee: No charge

(Elapsed time: one week)

Step 5: Facilitate a Preferred Future Design and Planning Session

Facilitate a one-and-one-half-day meeting of the strategic planning task force in the Washington, DC area to begin the creation of a preferred future for America's Charities and strategic plan. The results of the interviews with senior staff, planning task force members and external constituents will form the basis of the preferred future and plan development.

Day One

Craft a compelling and achievable preferred future, mission and plan for the organization. In advance of the meeting, America's Charities will send participants instructions on how to prepare for the planning meeting. The Forbes Group will develop a preparation document and advise on other materials to be sent.

- a) Begin the planning session with a review of the strategic management process and a discussion of the implications of the research.
- b) Discuss how America's Charities should be perceived and structured for the future.
- c) Based on this discussion, develop a preferred future that
 - is realistic, feasible and attainable
 - is credible and easily understood
 - is empowering, energizing and optimistic
 - is measurable
 - is flexible and evolving
 - will be shared and communicated
 - can be implemented
 - will attract a champion/spokesperson
- d.) Following development of the preferred future and timeline, develop a cogent mission that specifies what businesses the association is in. Based on this mission, draft a set of broad goals and specific objectives to give it life and meaning. (NOTE: On the chance

that we may not be able to finish drafting a set of broad goals and specific objectives on day one, we can move those items into the first part of day two.)

Day Two

- a) Review America's Charities structure, culture and resources to determine if they meet future needs. Agree on priorities so that most important objectives may be fully funded and those that are less important are addressed when resources are available.
- b) Following the session, The Forbes Group will summarize the outcomes of the preferred future and planning discussions for America's Charities staff to distribute for comment.
- c) Conduct a conference call with the strategic planning task force to achieve consensus on a final version of the plan.

Step 5 Professional Fee: \$00000 (Elapsed time: 3 weeks, including preparation)

Optional Step A: Develop a Work Planning Process and Plan

The Achilles heel of strategic planning and management is work planning. Without translating strategic direction into a program of work, the plan is meaningless. Once the strategic plan has received final approval from the board, the staff must develop strategies, tactics, budgets, assignments and timelines to accomplish strategic outcomes and priorities. The Forbes Group will work with America's Charities staff on preparation of the work plan and provide examples of approaches we have used with other clients that can be used as templates.

- a. Facilitate a meeting of the America's Charities staff to explain the process of translating the strategic plan into a work plan.
- b. Provide up to two days of counsel for senior staff leaders on creation of work plan documents and outcomes budgets.

Professional Fee: \$0000 (Elapsed time: 1 week)

TIME LINE

The elapsed times estimated in each step are blocks of time during which work will be conducted, not actual work times. We envision beginning work on this project as early in February as possible and concluding in late March or early April depending on the scheduling of the planning session.

COST PROPOSAL

Professional fees – The professional fees total \$00000 for the described scope of work (Steps 1 – 5). Steps 1, 2, 4 and 5 are core. Step 3 is optional, but recommended. If you choose to eliminate Step 3, the professional fees total \$100000. The cost is \$00000 with Optional Step A added. We will develop a payment schedule upon determination of the final scope of work.

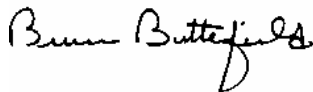
Reimbursable expenses – Actual expenses will be charged at cost. All expenses are reimbursable. These include, but are not limited to, such costs as travel and related expenses; telephone, faxing and copying charges; printing and binding costs; audio-visual costs; travel, plus other incidental expenses. Outside vendor charges, if any, are not included in this proposal and must be approved by America's Charities in advance. Reimbursable expenses are payable on receipt of our invoice. Invoices more than 30 days overdue incur a late fee of 1.5 percent.

ACCEPTANCE OF PROPOSAL

Please check the proposal elements you wish to accept below.

- ▶ **Proposal Steps 1, 2, 4 and 5 (excluding optional, but recommended, Step 3)**
- ▶ **Proposal Steps 1-5 (including optional, but recommended, Step 3)**
- ▶ **Proposal Steps 1-5 with optional Step A**

FOR THE FORBES GROUP, INC.



Bruce Butterfield, CAE President

January 21, 2003

ACCEPTED ON BEHALF OF AMERICA'S CHARITIES

By: _____ Date: _____

Name and title

REFERENCES

We are pleased to provide the following references of organizations for which we have performed related assignments.

Armstrong Enterprise Communications, Inc., 10389 Democracy Lane, Fairfax, VA 22030. Mr. Keith Hunter, president (703/691-4301) – The Forbes Group is a strategic partner of Armstrong and provides them and their clients with business solutions counseling. We are advising Mr. Hunter and his staff on the strategic direction and plan for the company. America's Charities is a technology customer of Armstrong.

Ronald McDonald House of Los Angeles, 4560 Mountain Avenue, Los Angeles, CA 90029. Mr. Vince Bryson, executive director (323/666-6400, ext. 3080) – The Forbes Group has worked with RMH-LA for four years on their strategic planning process and capital campaign.

Ronald McDonald House Charities of Southern California, Los Angeles, CA. Ms. B.J Peterson, volunteer board member (323/653-5133) – The Forbes Group has been tasked with assisting RMHC-SC with both strategic planning and board training. Ms. Peterson is a volunteer board member of RMHC-SC and RMH-LA. In addition, she is a member and former president of the American Society of Interior Designers for whom we have done planning work. Please see ASID reference.

American Association of Oral and Maxillofacial Surgeons, Rosemont, IL, Robert Rinaldi, Ph.D., executive director (847-678-6200 x311) – This 6,000-member organization has been a client of The Forbes Group since 1996. We have designed and conducted their strategic planning and management process, done a variety of research projects and counseled them on organizational redesign.

American Society of Interior Designers, Washington, DC, Michael Alin, executive director (202-675-2354) – For more than 12 years, The Forbes Group has counseled this 30,000 member organization of professional interior designers on strategic and organizational management. As a result of our work, ASID, downsized its board and leadership, reconfigured its committee structure, become strategically managed, embedded strategic management in its 50 chapters, and reinvented the profession into interior consultants who make interior space work as well as look good.

Society of Interventional Radiology, Fairfax, VA, Paul Pomerantz, CAE, former executive director (847-228-9900) – SCVIR hired The Forbes Group to help chart the future of the medical

practice. Through futures research and a two-day visioning process in May 2001, its leaders decided to create a new medical specialty by 2005.

APPENDIX

BRUCE BUTTERFIELD, CAE, FELLOW, ASAE and PRSA**PRESIDENT
THE FORBES GROUP**

Bruce Butterfield has over 30 years of association and public relations management experience with seven national organizations in the food, housing and insurance industries and the legal profession. He founded two national associations, is incubating others and has been deputy executive director of two organizations. He has lobbied Congress on public policy issues and advised the Department of Justice and Department of Transportation on national public awareness campaigns.

As president of The Forbes Group, he guides organizations through strategic thinking, planning, implementation and organizational design and conducts leadership research.

Butterfield is a Certified Association Executive (CAE) member and Fellow of the American Society of Association Executives and an Accredited member and Fellow of the Public Relations Society of America. He is past chairman of the CAE Development Committee of the Greater Washington Society of Association Executives.

He is past president of the National Capital Chapter of the Public Relations Society of America, past chairman of the national Association Section and a former member of the Chicago and National Capital Chapter boards of directors. He was inducted into the National Capital Chapter Hall of Fame in 1999.

Butterfield has won the Gold Quill Award for excellence in public affairs programs from the International Association of Business Communicators; the Thoth Award and Thoth Certificate of Excellence for public affairs programs from the National Capital Chapter of the Public Relations Society of America; the Gold Leaf Award from "Family Circle" Magazine; and the Monument Award for communications of the Greater Washington Society of Association Executives. He was named one of the top association public relations executives in the country by "Public Relations Quarterly" magazine.

His education includes a Bachelor of Science degree from Iowa State University and postgraduate institutes at Yale, Syracuse and New York University.

AMY L. BROWN
CHIEF EXECUTIVE OFFICER
THE FORBES GROUP

Amy Brown joined The Forbes Group in 1993 as a junior account executive assisting the principals of the firm in managing client work. She was promoted to account executive in 1994 and project director in 1995. She became executive vice president and COO in 1998 and chief executive officer in 2002. She is responsible for all aspects of office and client management including billing and financial management; preparing proposals; conducting staff and leadership interviews; writing reports and coordinating online surveys and research.

As one of The Forbes Group's leading futurists, Ms. Brown is an expert in change management, alternative futures scenarios, and visionary futures development. She has written several articles for *Association Trends* on these and other subjects. Ms. Brown has completed master's coursework in futures studies through the University of Houston at Clear Lake, one of two such programs in studies of the future in the nation.

Prior to joining The Forbes Group, Ms. Brown worked in the public information office and the office of management and information of the Fairfax (VA) County Park Authority. There, she handled various aspects of public relations work and was the assistant video producer for all of the county parks and recreation centers. She holds a bachelor's degree in communications from George Mason University, Fairfax, VA.

Ms. Brown's professional affiliations include the American Society of Association Executives, the Greater Washington Society of Association Executives and the World Future Society. She has served on various committees of both the ASAE and GWSAE and she has been involved in the creation of a new professional organization – the Association of Professional Futurists. She is a graduate of the 2002 Futures Leaders Conference (sponsored by the American Society of Association Executives).

KCBS TECHNICAL EVALUATION GUIDELINES

FOR ASSOCIATION MANAGEMENT PROPOSALS

Introduction

KCBS has prepared the following guidelines for leaders of Kosovo associations to use in evaluating proposals solicited from business services providers for specific work outlined in requests for proposals (RFPs). They are intended to provide evaluators with a means of making judgments about proposals that are based on consistent criteria consistently applied.

Evaluation Team Requirements

Evaluation teams should be composed of the association executive director and/or project manager and at least one member of the board of directors, preferably the president or his or her designee. Ideally, there should be a minimum of three people on the evaluation team to make it easier to break tie scores. Disagreements over scores and selection should be negotiated to consensus rather than decided by a vote.

Evaluators must be free of any conflicts of interest such as business or personal connections with the proposing firms. They must be fair in their application of proposal review criteria. They must protect the confidentiality of the proposing firms by not sharing information or proposals with anyone not on the evaluation team. They also should not discuss the conversations leading to a decision to make a contract offer outside the evaluation team.

Evaluation Checklist

To help in evaluation of service provider proposals, KCBS suggests a ten-point checklist, similar to the attached, covering technical elements of a good proposal. Each element is rated on a five-point scale with 5 being excellent and 1 being poor. Scores for each element are totaled for a final score. Final scores of 0-10 points indicate a poor proposal; 11-20 points a fair proposal; 21-30 points a satisfactory proposal; 31-40 a good proposal and 41-50 an excellent proposal.

Evaluators are urged to consider the following points when scoring a proposal element:

- 1. The proposal is responsive to requirements of the RFP** – Review the request for proposal submitted by your association and compare it to the tasks and deliverables suggested by the bidder to make sure that they are aligned. The bidder should cover each point in the RFP but not suggest work that is not requested.
- 2. The firm understands the association and its needs** – The bidder should demonstrate knowledge of the association and its needs early in the beginning of

the proposal. This knowledge should include an understanding of the issues facing the sector that the association represents; an understanding of the association's mission, programs and organization; and the programs and resources required for the association to fulfill its strategic plan and be successful. Technical knowledge of the sector is not required.

3. **The firm has experience with similar projects** – To conserve resources and successfully produce the deliverables required by the RFP, the bidder should demonstrate experience with like work in its statement of capabilities and references. If accounting services are required, for example, the firm or its partners should have provided those services to other organizations, particularly nonprofits or NGOs.
4. **Team members are qualified to perform the work** – There should be resumes or CVs of the senior leaders of the team included with the proposal. Team members and partners should have been selected because they bring proven expertise to specific areas of the project work.
5. **The proposal is clearly written** – Proposals should be written in concise language. Brevity is more important than length. Each deliverable and means of producing it should be succinctly described. Because it was required that proposals be written in English, it should be evident that spelling, grammar and usage were checked for appropriateness and accuracy.
6. **The proposal is well organized** – There should be a logical flow to the proposal. There should be:
 - a. A title page including, at minimum, the name of the association, the purpose of the proposal and the name of the bidder.
 - b. A table of contents if the proposal is fairly long and divided into sections.
 - c. A brief background statement indicating that the bidder understands the purpose of the project and why they are qualified to undertake it.
 - d. A brief capabilities statement about the firm's competencies and history.
 - e. Brief biographies of each senior team member.
 - f. A modular scope of work that describes each deliverable, associates it with a specific requirement of the RFP, includes the fixed-price professional fee to accomplish it, and a time frame in which the deliverable will be produced.
 - g. A general project timeline tied to starting and ending dates and milestones, not the calendar.

- h. An expression of commitment to conduct the work if chosen.
 - i. A means of accepting the proposal.
 - j. References from clients with similar characteristics.
 - k. An appendix containing more detailed CVs of team members and any additional information that adds clarity to the proposal, such as appropriate articles and white papers and examples of similar work.
- 7. The approaches to the deliverables are creative** – A good proposal should demonstrate the unique ability of the bidder to be innovative in responding to the specifics of the RFP. Approaches should be more than just elements cut and pasted from other proposals. There should be no boilerplate, or generic information that has little or nothing to do with the assignments requested. The bidder should also demonstrate creativity in raising resources to pay for the proposal.
- 8. Pricing is clear, thorough and realistic** – The bidder should associate pricing with deliverables, not lump them together with a large, unexplained number at the end. Pricing should list professional fees and reimbursable expenses separately. Professional fees should be fixed price for the work described. The association has limited resources to expend and grant money also is limited. The bidder should not propose a budget that could never be met by the four financing methods – dues, fees for service, sponsorships and grants.
- 9. Deadlines are realistic** – The timelines for accomplishing deliverables should not be too short for the work product to be of high quality or too long for the one-year life of the contract. They should reflect reasonable and common practices for similar work.
- 10. References provided** – The bidder should provide several references of previous clients for similar work that can be checked. The reference should include the name of the organization, a description of the work performed, the name of the principal contact, and a telephone number and email address.

Association Service Product Proposal Evaluation Checklist

Association _____

Bidder _____

	Excellent	Good	Satisfactory	Fair	Poor	TOTAL SCORE
Score	5	4	3	2	1	
1. The proposal is responsive to the RFP						
2. The proposal is clearly written						
3. The proposal is well organized						
4. The project team members are qualified to perform the work						
5. The approaches to the deliverables demonstrate creativity						
6. Other Criteria: <i>Add as required</i>						

